

# 529 College Savings Plan Investment Instructions

Participant's Name

Participant's Social Security number or Tax ID number

Participant's Account number

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Beneficiary's Name

Beneficiary's Social Security number or Taxpayer ID number

Beneficiary's Date of birth (month/day/year)

Use this form to change how your future contributions are invested or make an exchange of the contributions and earnings currently invested in your state-sponsored, Fidelity-managed 529 College Savings Plan account. **Return the completed form to Fidelity Investments College Plan Service Center, PO Box 770001, Cincinnati, OH 45277-0015.** If you have any questions, call us anytime at **1-800-544-1914** or visit us at **Fidelity.com**.

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## 529 COLLEGE SAVINGS PLAN PORTFOLIO EXCHANGE

Use this section to make a Portfolio exchange in your Fidelity-managed 529 College Savings Plan account. All previously invested money (contributions and earnings) in your account will be exchanged from the current Portfolio position(s) and reinvested per your instructions below. You may make an exchange of existing investments in your account *once* every calendar year for a given beneficiary and upon the change of the designated beneficiary of the account.

☐ I do not wish to make my yearly exchange at this time.

☐ I do wish to make my yearly exchange. Please follow instructions below.

You can invest your 529 College Savings Plan contributions based on one of three options detailed in this section.

### Choose one option only

☐ **Age-Based Strategy**

100% of your contributions will be invested in an Age-Based Portfolio that invests in actively managed Fidelity mutual funds and is designed for the designated beneficiary's age based on the date of birth listed above Section 1.

☐ **Age-Based Strategy (Index Series)**

100% of your contributions will be invested in an Age-Based Portfolio that invests in Fidelity index mutual funds and is designed for the designated beneficiary's age based on the date of birth listed above Section 1.

☐ **Custom Strategy**

Create your own investment mix from any of the 529 College Savings Plan Portfolios below.

100% Equity Portfolio \_\_\_\_\_ %

70% Equity Portfolio \_\_\_\_\_ %

Conservative Portfolio \_\_\_\_\_ %

100% Equity Portfolio (Index Series) \_\_\_\_\_ %

70% Equity Portfolio (Index Series) \_\_\_\_\_ %

Conservative Portfolio (Index Series) \_\_\_\_\_ %

Social Choice Portfolio (Index)\* \_\_\_\_\_ %

Spartan® 500 Index \_\_\_\_\_ %

Total Market Index \_\_\_\_\_ %

International Index \_\_\_\_\_ %

Intermediate Treasury Bond Index \_\_\_\_\_ %

Money Market Portfolio (Cash Reserves) \_\_\_\_\_ %

**Total (must equal 100%)** \_\_\_\_\_ %

Please use increments of 5%.

\*California plan only

*Please continue*

## 2 FUTURE CONTRIBUTIONS

☐ I do NOT wish to change my future contributions.

IF YOU WISH TO MAKE A CHANGE FOR A ONE-TIME CONTRIBUTION OR ALL FUTURE CONTRIBUTIONS,  
SELECT ONE OF THE FOLLOWING:

☐ Please change instructions for this investment only. (Must complete section 3)

☐ Change instructions for ALL FUTURE contributions.

You can invest your 529 College Savings plan contributions based on one of three options detailed in this section.

### Choose one option only

☐ **Age-Based Strategy**

100% of your contributions will be invested in an Age-Based Portfolio that invests in actively managed Fidelity mutual funds and is designed for the designated beneficiary's age based on the date of birth listed above Section 1.

☐ **Age-Based Strategy (Index Series)**

100% of your contributions will be invested in an Age-Based Portfolio that invests in Fidelity index mutual funds and is designed for the designated beneficiary's age based on the date of birth listed above Section 1.

☐ **Custom Strategy**

Create your own investment mix from any of the 529 College Savings Plan Portfolios below.

100% Equity Portfolio	_____	%	Please use increments of 5%.
70% Equity Portfolio	_____	%	
Conservative Portfolio	_____	%	
100% Equity Portfolio (Index Series)	_____	%	
70% Equity Portfolio (Index Series)	_____	%	
Conservative Portfolio (Index Series)	_____	%	
Social Choice Portfolio (Index)*	_____	%	
Spartan® 500 Index	_____	%	
Total Market Index	_____	%	
International Index	_____	%	
Intermediate Treasury Bond Index	_____	%	
Money Market Portfolio (Cash Reserves)	_____	%	
<b>Total (must equal 100%)</b>	_____	%	

\*California plan only

## 3 CONTRIBUTING TO YOUR ACCOUNT

To make a contribution to your Fidelity-managed 529 College Savings Plan account, check boxes that apply. Your contributions will be invested according to your investment allocation instructions in Section 2.

☐ I've enclosed a check for \$\_\_\_\_\_ made payable to **Fidelity Brokerage Services LLC**.

If you have a Fidelity nonretirement brokerage or mutual fund account, you may choose the following options. I instruct you to:

☐ Transfer \$\_\_\_\_\_ (dollar amount) from my core account in my Fidelity brokerage account, number

□□□ - □□□□□□

☐ Sell \$\_\_\_\_\_ (dollar amount) or \_\_\_\_\_ (shares) and transfer the proceeds from the following Fidelity **mutual fund**.

\_\_\_\_\_  
(fund name)

My account number is □□□ - □□□□□□

Fidelity mutual funds will be sold and subject to any applicable trading fees as is specified in the fund's prospectus. We require 100% of a trade's value in a new account.

I hereby ratify these written instructions and any telephone instructions given pursuant to this authority and agree that neither the Plan nor Fidelity will be liable for any loss, liability, cost, or expense for acting upon such instructions. I understand that telephone calls to Fidelity may be recorded, and I consent to such tape recordings.

SIGNATURE OF PARTICIPANT/AUTHORIZED INDIVIDUAL

Date

X



Smart move.®

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College Plan Service Center  
PO Box 770001, Cincinnati, OH 45277-0015  
Fidelity Brokerage Services LLC,  
Member NYSE, SIPC

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